

# **Wisconsin Functional Screen**

## **Technical Assistance Document**

**ISSUE DATE:** 6/21/2006

### **APPLICABILITY:**

- ☒ **Adult Long Term Care**
- ☒ **Children's Long Term Support**
- ☒ **Mental Health/AODA**

**TOPIC:** Functional Screen Information Access (FSIA) Application Security Overview

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This document gives a brief overview of the screener profiles and privileges available within the application and the features associated with each. In addition, agency privileges for each type of screen are explained in further detail.

### **Screener Profiles**

Following is a description of each profile within FSIA along with a description of access rights:

- **Adult Screener Profile** – Ability to add, update, and view Adult applicants via the Initial Screen, Annual Rescreen, Change in Condition, Edit, and View buttons on the Applicant Screen Information page. Screeners have the ability to view all Adult Summary Reports, meaning the 'Adult Long Term Care Reports' link will appear on the Forms and Summary Reports page. Screeners also have the ability to view all Adult applicant reports which include the Notes Summary report, the Full FS report, the Eligibility report, and the upcoming Functional Screen summary report. Screeners with this profile have the ability to transfer an applicant's Adult screen to another agency. The Transfer link will appear on the Applicant Screen Information page along the left-hand menu bar for all Adult applicants the screener has access to (based upon which agency s/he is assigned.)

Screeners with this profile may only make updates to applicant's who are assigned to the agency the screener is in or a sub-agency of the agency the screener is in.

- **Children's Screener Profile** - Ability to add, update, and view Children's applicants via the Initial Screen, Annual Rescreen, Change in Condition, Edit, and View buttons on the Applicant Screen Information page. Screeners have the ability to view all Children's Summary Reports, meaning the 'Children's Long Term Supports Reports' link will appear on the Forms and Summary Reports page. Screeners also have the ability to view all Children's applicant reports, which includes the Notes Summary report and the Full FS report. Screeners with this profile have the ability to transfer an applicant's Children's screen to another agency. The Transfer link will appear on the Applicant Screen Information page along the left-hand menu bar for all Children's applicants the screener has access to (based upon which agency s/he is assigned.)

Screeners with this profile may only make updates to applicant's who are assigned to the agency the screener is in or a sub-agency of the agency the screener is in.

- **Mental Health Screener Profile** - Ability to add, update, and view Mental Health applicants via the Initial Screen, Annual Rescreen, Change in Condition, Edit, and View buttons on the

Applicant Screen Information page. Screeners have the ability to view all Mental Health / AODA Summary Reports, meaning the 'Mental Health / AODA Reports' link will appear on the Forms and Summary Reports page. Screeners also have the ability to view all Mental Health applicant reports, which includes the Notes Summary report and the Full FS report. Screeners with this profile have the ability to transfer an applicant's MH screen to another agency. The Transfer link will appear on the Applicant Screen Information page along the left-hand menu bar for all MH applicants the screener has access to (based upon which agency s/he is assigned.)

Screeners with this profile may only make updates to applicant's who are assigned to the agency the screener is in or a sub-agency of the agency the screener is in.

- **Agency Administration Profile** – Screeners with this profile have the ability to add new agencies and modify existing agencies. An 'Administration' link will appear on the Homepage as well as on the horizontal menu bar.
- **Delete Applicant Profile** – Gives the screener the ability to delete any applicants s/he has access to, but only those applicants who do not already have eligibility calculated. The Delete link will appear in the left-hand menu bar on the Applicant Screen Information page.
- **FAQ Administrator Profile** – Allows a screener to add, delete, and update FAQs and FAQ categories. A 'Frequently Asked Questions' link will appear on the Homepage, and a 'FAQ' link will appear in the horizontal menu bar.
- **State Employee Profile** – Screeners with the State Employee Profile have access to all summary reports, meaning the reports link will appear on the Homepage and on the horizontal menu bar. On the Forms and Summary Reports page, links for Adult, Children's, and Mental Health summary reports will appear. State screeners have the ability to transfer any applicant's screen to another agency. The Transfer link will appear on the Applicant Screen Information page along the left-hand menu bar for all applicants. Access to all applicant reports (notes summary, eligibility report, functional screen summary) can be found along the left-hand menu bar when the screener clicks on the View button.
- **TMG Profile** - Screeners with the TMG Profile have access to all Adult summary reports, meaning the 'Forms and Summary Reports' link will appear on the Homepage and on the horizontal menu bar. On the Forms and Summary Reports page a link for the Adult summary reports will appear. Access to all Adult applicant reports (notes summary, eligibility report, functional screen summary) can be found along the left-hand menu bar when the screener clicks on the View button.

In addition to having the TMG profile, TMG users can only view reports for Adult applicants who meet the following conditions:

- Are in a COP W & CIP II HCB waiver group **and**
- Are assigned to an HCBW agency or RC with no CMO/U

### **Agency Privileges:**

Agencies can be assigned different privileges for each type of screen: Adult LTC, Children's LTS, and Mental Health/AODA. Following is a description of each:

- **Adult Privileges** – Within the Agency Administration module, each agency is assigned as one of the following privileges for Adult screens: Family Care, Family Care – RC Only, HCBW, PACE/Partnership, or N/A. If, for example, Milwaukee County RC is assigned an HCBW privilege, then Adult screeners assigned to that agency will only see Home and Community Based Waiver eligibility results when they calculate eligibility. The Family Care, Family Care – RC Only, and PACE/Partnership privileges work the same way. If, however, Milwaukee County RC is a type N/A, then the Eligibility Results page will display the following message to all Adult screeners in that agency: “You do not have access to view the eligibility results for this applicant.” In addition, if the type is N/A, then screeners will not be able to view the eligibility results on reports.
- **Children’s Privileges** – An agency can be assigned one of two Children’s privileges: Children’s LTS or N/A. If the agency has privilege Children’s LTS, then all Children’s screeners assigned to this agency can view the eligibility results on the Eligibility Results page. If the privilege type is N/A, then the Eligibility Results page will display the following message to all Children’s screeners in that agency: “You do not have access to view the eligibility results for this applicant.” In addition, if the type is N/A, then screeners will not be able to view the eligibility results on reports.
- **Mental Health Privileges** - An agency can be assigned one of two MH privileges: Mental Health/AODA or N/A. If the agency has the Health/AODA privilege, then all MH screeners assigned to this agency can view the eligibility results on the Eligibility Results page. If the privilege type is N/A, then the Eligibility Results page will display the following message to all MH screeners in that agency: “You do not have access to view the eligibility results for this applicant.” In addition, if the type is N/A, then screeners will not be able to view the eligibility results on reports.

### **Application Security:**

It is important to remember that the application’s security is based on a screener’s assigned profile. In addition, if a screener belongs to more than one agency, profiles can be set-up differently for each agency the screener is assigned. For example, Screener A may have a Children’s screener profile in the Adam’s County HCBW and may also have an Adult’s screener profile in the Milwaukee County RC. Screener A would be able to do the following:

- add, update, and view all Adult applicants in Milwaukee County RC
- add, update, and view all Children’s applicants in the Adam’s County HCBW

Screener A would not, however, be able to add, update, or view Adult applicants in Adam’s County HCBW, and vice versa.

The privileges assigned to agencies via the Agency Administration module only effect the Eligibility Results page and Eligibility section of reports. These privileges do not effect the application security. For example, let’s say Milwaukee County RC has an agency privilege of Adult: PACE/Partnership, Children’s - NA, and MH - NA. Let’s also say that Screener B is assigned to Milwaukee County RC and has adult screener and children’s screener privileges. Screener B would be able to add, update, and view all Children’s applicants in the Milwaukee County RC agency, but would not be able to view the Eligibility results for these applicants.